

# Not-for-Profit Lifecycles

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## PARTICIPANT WORKBOOK

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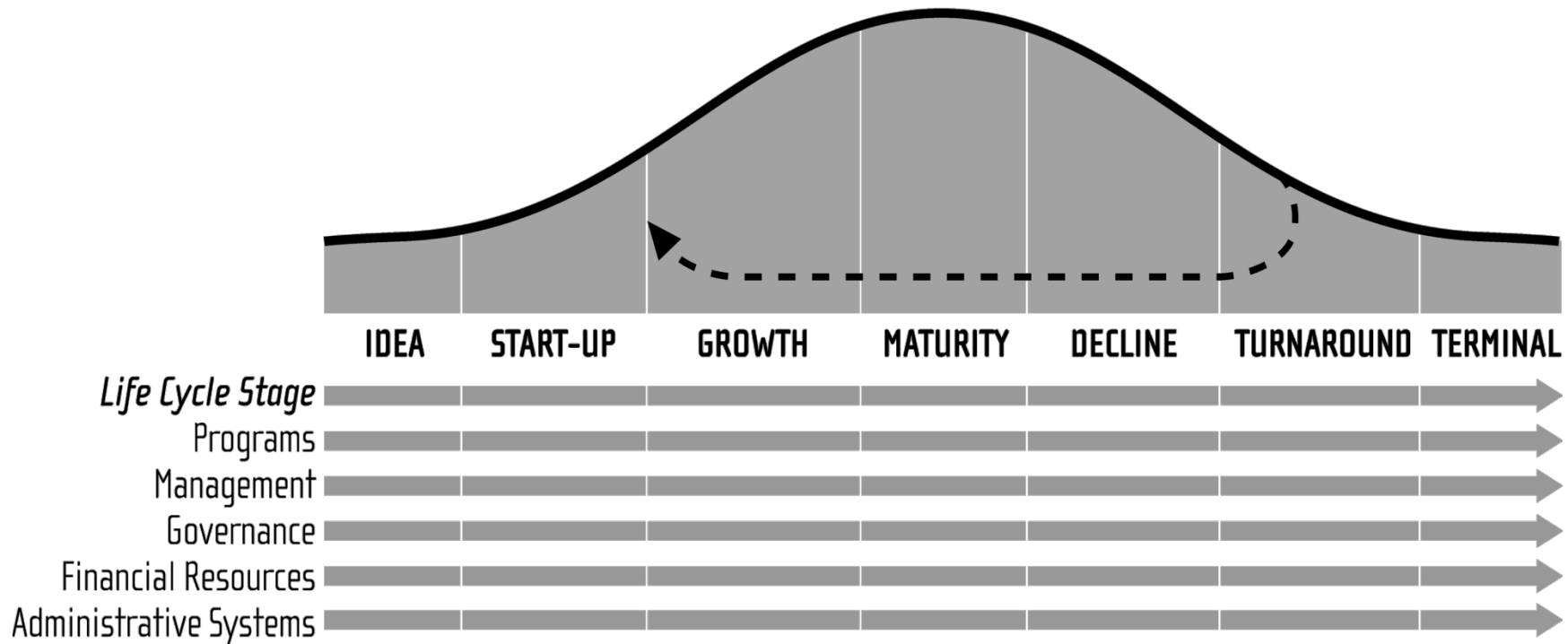
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## Activity #1:

Identify which lifecycle stages you believe your organization is at on all five dimensions (overall; programs; management; governance; financial resources; and administrative systems):



## Activity #2: In-depth Lifecycle Identification: Your Action Plan

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How will you approach a more in-depth lifecycle identification process?

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Who should be involved for maximum buy-in and impact?

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What materials may need to be prepared prior to an in-depth lifecycle identification?

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How will you involve your whole board?

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# Takeaway: In-depth Lifecycle Identification Questions

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## *Part One: History, Values and Defining Moments*

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In what year was the organization founded, and why was it founded?

Has that purpose changed over time?

Describe your nonprofit's most significant milestones and evolutions through the years, particularly the defining moments.

List your organization's shared "core values." Where possible, discuss these as a group since they will form the basis for all future decision-making.

Are these values linked to defining moments, and/or have they changed over time?

## *Part Two: Market and External Environment*

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Describe the constituency you are in business to serve. (Many nonprofits have multiple constituencies.) Is this the constituency that needs you most, or should you consider redirecting your focus to a changing market?

Who else serves this market? What distinguishes your services from others with the same mission; i.e., your competitors?

What are the key trends and issues related to your organization's field of work?

How do these trends affect your current mission and services? Are all your services still relevant or should some be reviewed in light of changing markets, demographics or economic climate.

### ***Part Three: Mission and Programs***

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As you review your mission statement, does it adequately describe who you are as an organization?

Does the mission statement describe who your organization is in business to serve and how they benefit from your services?

List your programs and provide a brief description of each

How do these programs address the market needs you identified above?

How many people do you serve in each of your program areas per year? Is that number growing, declining, or staying the same?

What are the sources of income for each of these program areas, and which are most strongly funded? Which ones struggle financially?

What future program possibilities are you considering? How will those programs benefit your constituency?